

JOB DESCRIPTION

Position Title: **Apprentice Account Handler**

Key Responsibilities & Accountabilities:

- Assisting in the Co-ordination of the placement of risks, including production of documentation to assist placement and maintenance throughout the risk life cycle (Underwriting Submissions, Market Reform Contracts, Wordings, Endorsements)
- Assisting developing and maintaining an active role/relationship with clients via e-mail, telephone and face-to-face, dealing with Client, Underwriter and Market Representative resolving or referring all queries to a satisfactory level.
- Learning and demonstrate excellent technical knowledge and ability to communicate this to various audiences (Insureds, Retailers, Wholesalers, Internal and Underwriters)
- Assisting Account Handler and broker ensuring that accounts are serviced efficiently and professionally – creates MRC slips, Invoices and Underwriter submissions; deals with slip endorsements; maintaining all electronic files and compliance related checks where required to meet clients, Markets and third parties expectation
- Assisting in the Monitor and maintain workflow, budgetary records, debit notes and policy wordings; operate a paperless filing system and strives to streamline processes.
- Assisting Brokers and Account Handlers to identify and qualify opportunities for business development.
- Assist in design of complex program Insurance structures to provide innovative risk transfer alternatives as required.
- Learning and ensuring excellent service and compliance skills in the placement of Risks ensuring appropriate procedures and electronic tools have been utilised.
- Learning about regulatory requirements (Contract Certainty, LMBS, FCA and International requirements).
- Learning and developing skills which enable and encourage interaction and collaboration with other divisional units.
- Adheres to BMS Group Minimum standards, policies and procedures.

- Adhere to company and regulatory policies, procedures together with mandatory training requirements.
- Adhere to financial reporting requirements including monthly phasing of income (where relevant to role).

Functional & Behavioural Competencies required:

- Excellent attention to detail and ability to plan meticulously
- Excellent persuasive and influencing skills
- Client facing and customer focused with excellent interpersonal and written communication skills
- Excellent IT & organisational skills
- Ability to perform effectively to tight deadlines with good personal organisation and time management skills
- Anticipates problems in advance and makes contingencies
- Proactive, always looking for ways of delivering a better or more efficient service
- Communicates clearly; effectively contributes to the team and interacts with others
- Personally demonstrate the five BMS values and ensure that team members are aligned with these:
 - Accountable
 - Entrepreneurial
 - Collaborative
 - Empowering
 - Disciplined